



# Software Asset Management (SAM) Strategy

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- Software Asset Management is Key for Software Compliance
- Software Asset Management Standard ISO/IEC 19770-1



# Software Asset Management



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- What is SAM?
  - Business discipline by which companies optimize their investment in software assets.
  - Set of processes, policies, practices, and tools for managing the life cycle of software.



# Purpose of SAM



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- Harness the maximum value and control from our investment in software.
- Manage software assets through three lenses:
  - Vendor View – what are we licensed for? License requirements determined from *ownership* data.
  - IT View – what have we deployed? License requirements determined from *inventory* data.
  - Business View – what is our usage? License requirements determined from *usage* data.



# Benefits of SAM



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Save Money

Get Peace of Mind

Help Keep Our Data Safe

Improve Business Performance

# ITIL Recommendations for Approaching SAM



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- Set a vision
- Set goals and objectives
- Define detailed strategy
- Clarify roles and responsibilities
- Define policies and procedures
- Determine software inventory



# SAM Vision



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## Mission Statement

The SAM mission is to provide effective management, control and protection of software assets within the State of Montana.



# SAM Goals and Objectives



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## 3 goals for Software License Compliance

**Goal #1 Cut Costs**

**Goal #2 Gain Control**

**Goal #3 End License Compliance Concerns**



# BASELINE ASSESSMENTS – Where Are We Now?



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- ISO/IEC 19770-1
  - First SAM standard based on industry best practices
  - International standard launched in 2006
  - Concerned with entire lifecycle of software
  - Six key areas of best practices or process categories



# Scope of ISO/IEC 19770-1



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- State of Montana
- Establishes baseline for integrated set of 27 sub-processes for SAM within 6 process categories

# ISO/IEC Framework



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- **Organizational Management Processes for SAM**

- 1) **Control Environment**

- Corporate Governance Process for SAM
- Roles and Responsibilities for SAM
- Policies, Processes and Procedures for SAM
- Competence in SAM

- 2) **Planning and Implementation Processes for SAM**

- Planning for SAM
- Implementation of SAM
- Monitoring and Review of SAM
- Continual Improvement of SAM

# ISO/IEC Framework continued



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- **Core SAM Processes**

- 3) **Inventory Processes for SAM**

- Software Asset Identification
    - Software Asset Inventory Management
    - Software Asset Control

- 4) **Verification and Compliance Processes for SAM**

- Software Asset Record Verification
    - Software Licensing Compliance
    - Software Asset Security Compliance
    - Conformance Verification for SAM

- 5) **Operations Management Processes and Interfaces for SAM**

- Relationship and Contract Management for SAM
    - Financial Management for SAM
    - Service-level Management for SAM
    - Security Management for SAM



# ISO/IEC Framework continued

- **Primary Process Interfaces**

## 6) Life Cycle Process Interfaces for SAM

- Change Management Process
- Acquisition Process
- Software Development Process
- Software Release Management Process
- Software Deployment Process
- Incident Management Process
- Problem Management Process

# MEASURABLE TARGETS: Where Do We Want To Be?



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## SAM Implementation Plan:

- **Target #1:** Establish an Anonymous Employee Reporting Program by December 2009.
- **Target #2:** Establish a Software Asset Management training program for management and staff.
- **Target #3:** Completion of the SAM Self-Assessment using ISO/IEC 19770-1 by early spring.
- **Target #4:** Purchase and implementation of the SAM Tool by January 2010.
- **Target #5:** Assist PCMB Bureau Chief with creating SAM policies, processes, and procedures. Completion within the next 12 to 24 months.
- **Target #6:** Establish Relationships with Agencies.
- **Target #7:** Completion of creating a software repository within one year.
- **Target #8:** Create WebPages for PCMB Software Procurement and License Compliance within the next 12 to 24 months.

# SERVICE and PROCESS IMPROVEMENT: How do We Get There?



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- SAM Implementation Plan with timeline for defined targets

# MEASUREMENTS and METRICS: Did We Get There?



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- Define measurement tools and metrics
  - a) To be developed.





# Questions? Comments?



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- *SAM in a Nutshell:*
  - *Understand what we have*
  - *Understand where it is*
  - *Understand how it's used*
  - *Understand how it's licensed*
  - *Understand when it need to be upgraded or changed*
  - *Understand who is responsible*